

VIRGINIA STATE BAR YOUNG LAWYERS CONFERENCE WILLS FOR HEROES FACT SHEET

I. What is the “Wills for Heroes” program?

The Wills for Heroes program is designed to provide free legal estate planning services to first responders in Virginia. Both the Virginia State Bar Young Lawyers Conference (VSB YLC) and the Virginia Bar Association Young Lawyers Division (VBA YLD) sponsor the program. We work with local bar associations and young lawyers groups to implement the program in cities and counties across the Commonwealth.

II. What Services Are Provided?

Volunteer attorneys will provide educational sessions to help first responders understand why estate planning is important. After attending an educational session, first responders will meet with a volunteer attorney who will draft a basic will, advanced medical directive and power of attorney, using the HotDocs document assembly program. These documents are generally prepared at a fire or police station, and are executed the same day so that they will be finalized and effective immediately. We provide all equipment needed to prepare the documents, including printers and laptop computers.

Before providing services to the first responders, all attorney volunteers attend a free CLE, which is sponsored by the YLC and YLD.

III. Who is Eligible?

All “first responders,” other than enlisted and reserve military members, are eligible for this free service. It must be coordinated through their employer. Those eligible include:

- Police officers
- Firefighters
- Sheriff’s Deputies

Please note, however, that (i) those owning large estates (over \$1 million), (ii) persons owning a business with someone other than their spouse, and (iii) those with complicated probate matters are beyond the scope of the Wills for Heroes program. If a first responder falls into one of these categories, he or she will be referred to another organization that may be able to help with estate planning needs.

Also, we are currently unable to provide services for spouses of the first responders, or non-emergency personnel working in the various departments (for example, administrative assistants).

IV. How Does the Process Work?

First responders will first attend one of the educational sessions provided as part of the program. During the educational session, they will learn about the importance and content of a will, advanced medical directive and durable power of attorney. We will work with the various departments to

ensure that educational sessions are held at convenient times and locations to allow everyone a chance to attend. At the conclusion of the educational session, first responders will be given the opportunity to sign up for a time to meet with an attorney who will prepare these documents for them.

Second, first responders will complete a questionnaire that will allow an attorney to prepare their will, advanced medical directive and durable power of attorney.

Third, they will meet with an attorney at the time they signed up for at the educational session. The attorney will prepare all of the documents and the first responder will sign them once they are completed.

V. Are Other Legal Services Provided?

The Wills for Heroes program provides only the services listed above. If a first responder has other legal needs, he or she may consult a personal attorney or use the Virginia State Bar referral service to find another attorney who may be able to assist.

VI. If I Am Interested in Bringing Wills for Heroes to My Locality, What Should I Do?

You should immediately contact and secure support from an official bar organization representing your locality – a local bar association, young lawyers group, or pro bono division. That organization will be responsible for helping publicize the program and for securing volunteers.

We need the following information before we can commit to bringing the program to your locality:

- A. The name of the main contact person who will work with our Wills for Heroes committee to coordinate the educational and document preparation sessions (name, telephone number, email address, mailing address).
- B. The names of other local volunteers who will make up your “on the ground” committee.
- C. The names of at least two trusts and estates attorneys who are committed to the program and will help deliver the CLE and the education sessions to first responders. These volunteers should also be available to attend most of the document preparation sessions (or have another T&E attorney attend in their place) in order to answer any questions that may arise.
- D. The name of your main contact at the police, fire and sheriff’s departments.
- E. Commitments from the departments that they will publicize and make education sessions mandatory. Will the department announce the program at roll call or in some other fashion (i.e. email)? [Of course, whether a first responder signs up to receive the estate planning documents is purely voluntary, but we hope to at least educate all on the benefits of estate planning].

- F. The number of officers/deputies/firefighters in the local departments. How are they organized?
- G. Do the departments have a facility that we can use for the educational session? If so, how many people does it hold?
- H. When do the departments recommend holding educational sessions and document drafting sessions so that the greatest number of responders will have the opportunity to attend? Specifically, what days of the week are best? What times of the day are best?
- I. Does the department have a facility that we can use for the document drafting session?
 - 1. If so, how many people does it hold?
 - 2. Does it have sufficient outlets to allow for at least 10 laptops and printers?
- J. Does your bar association have a safe location where we can store the laptops and printers that will be used for the document drafting?
- K. Have you contacted your local VSB YLC Circuit Representative to alert them of your desire to bring the program to your locality? [Circuit Reps are listed on the VSB YLC website].

VI. After I Compile this Information, What's Next?

This information should be submitted, in writing, to Erin Whaley, our Wills For Heroes Committee Chair. Erin's e-mail is Erin.Whaley@troutmansanders.com.

We will contact you shortly after receiving this information. Every effort will be made to bring WFH to your area as soon as possible, but please understand there may be a short wait if the equipment is already in use at another location.

If you have any questions, please feel free to contact Erin, or YLC board members Carson Sullivan (carsonsullivan@paulhastings.com) or Christy Kiely (ckiely@hunton.com).

Thank you for your interest in Wills for Heroes!